Horizon
Intermediate Circulation

Intermediate Circulation

Intermediate Circulation builds upon the training you received in the Circulation Basics course. You should have a basic understanding of the Circulation module by having completed the Circulation Basics course. You should not proceed with this training unless you have fulfilled the earlier training as mentioned.

The first section of this manual provides a review of basic Horizon tasks. If you do not need a review of basic tasks, skip directly into the section on Payments and Blocks.

You will learn about these topics in this manual:

- Horizon review
- Payments and blocks
- Requests and holds
- Notices

Horizon Review

In This Section Learn About:

•	Horizon login
•	Launcher navigation
•	Dynamic menus
•	Searching

This section provides an overview of basic Horizon skills. You may feel like you already know this material well enough to skip ahead to the next section.

If you are new to Horizon, or if you have not had much time to use your Horizon system, this section gives you the opportunity to review many of the basic skill sets that you will need.

The searching section of this manual provides you with limited information about using staffPAC searching to locate records in your database. If you need a more in-depth review of searching procedures, you will likely want to access the Dynix website and download the more a more-detailed training document that covers searching.

Logging into Horizon

You log into Horizon by double clicking on the Horizon icon on your computer desktop. This action launches the Horizon executable. Before you can actually get into Horizon you must supply your login and password information.

1. Follow these steps to log into Horizon:

2. Double click on the Horizon icon on your computer desktop. Horizon displays the Horizon login screen:

3. Enter your User ID in the User field.

4. Enter your password in the Password field.

Your system administrator can give you your User ID and password. If you are logging into a training database (instead of your live Horizon database) you may need to use a different User ID and password.

Horizon remembers your Server and Database settings. If you lose these settings due to an electrical surge or other unexpected event, you will need your system administrator to supply the database login and password before you can log into Horizon.

Once you have entered in your password, the **Options** button becomes highlighted. The **Options** button allows you to choose such things as the location you are going to log into, and the font you are going to use. These defaults are set on the training database so you do not have to set them each time you log in. However, if you want to change them you can do so.

5. If you want to change your login options, click **Options**. Otherwise, skip to Step 6.

6. You can change these options:

   - The location you want to log into.
   - The default owner.
   - The language.
   - The font you want to use.
   - The font size you want to use.

7. Mark the Make Default box if you want to save these defaults.

   If you mark the Make Default box, the defaults will be attached to this login. Anyone else who logs in with the same login will see the defaults you set unless they change them in the Options box when they log in.

8. Click **OK**.

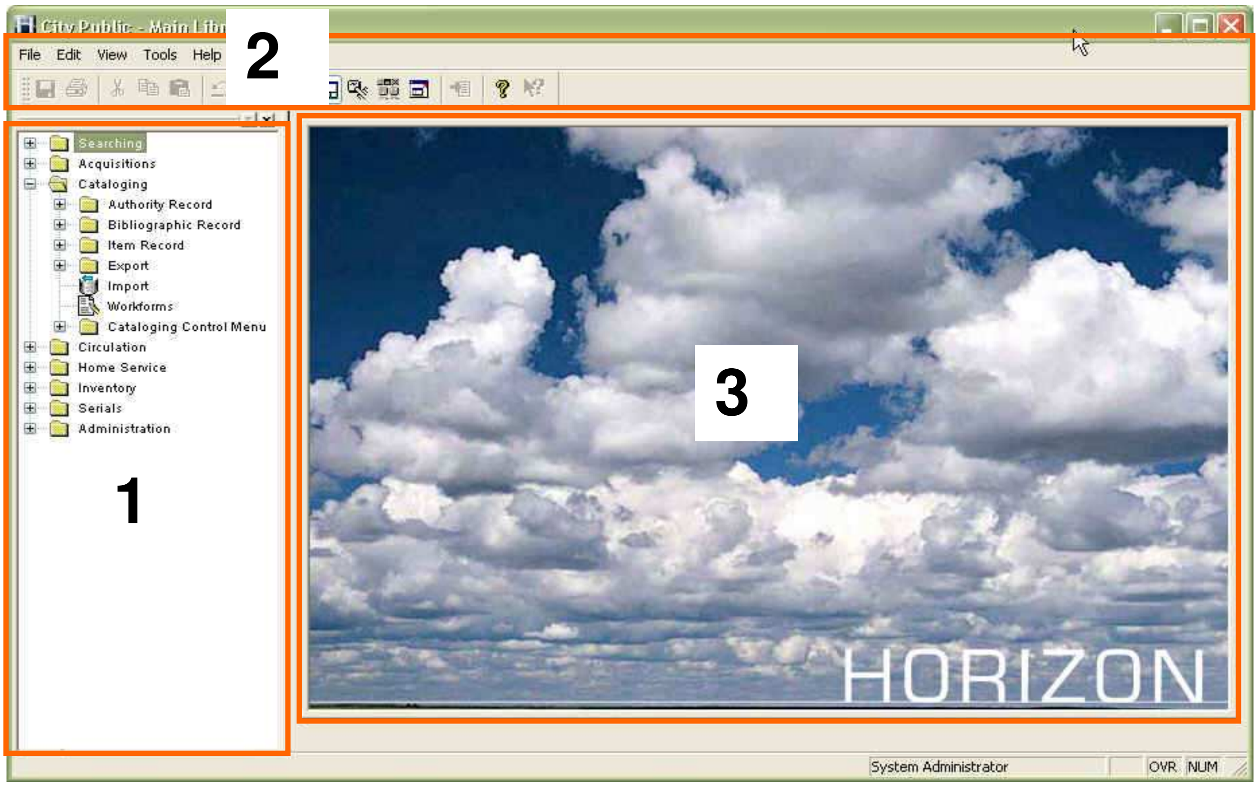
   The Horizon Launcher opens: You have successfully logged into Horizon and can now begin using the application.

Navigating the Launcher Environment.

The Horizon user interface is called the Launcher. The Horizon Launcher provides the environment, functionality, and features for all Horizon modules.

Dynix designed the Launcher to be adaptable to the day-to-day workflow at your library. You have a great deal of flexibility in the way you can organize your Launcher, and the tools that you can make available by the click of a button. These options are generally set up by your system administrator.

This is the Horizon Launcher:



Navigation Bar

The bar on the left is the Navigation Bar (1). You open a folder by clicking on the plus sign (+) next to it. You close a folder by clicking on the negative sign next to it (-).

Processes on the Navigation Bar are represented by icons. You activate a process by double-clicking on it. Depending on your internal library policies, it is possible for you to organize and display the processes according to your preferences. You may also be permitted to place third-party applications and/or links to often-used websites in your Navigation Bar. These options, if available to you, are granted by your system administrator.

Menu Bar and Toolbar

The Menu Bar and Tool Bar (2) provide the tools and options that allow you to interact with the open processes.

The Menu Bar is dynamic. In other words, Horizon populates a specific menu with information relative to the active process (window). The other processes that you have open, and what actions you have taken within those windows help determine the availability of menu options and program functions.

The Toolbar comprises a number of buttons, which, when clicked, launch Horizon processes or other applications. Buttons may be displayed in a small format to conserve screen space, or in a large format for ease of use.

By default, Horizon displays buttons with standard Windows features, such as Print, Save, Cut, Copy, Paste, and so forth. Additionally, you can display any Horizon process in the Navigation Bar as a button for greater accessibility. Finally, if permitted at your library, you can create buttons for any third-party applications as well.

The Launcher has the potential to be the interface point with all programs and workflows that you conduct at your computer. Your system administrator controls the full range of the Horizon Launcher's features and functionality.

Workspace

The picture pane area on the right-side of the Launcher is the workspace (3). This is the area where all the Horizon processes (work windows) open. Windows that open in the workspace can be resized, minimized, and shown full-screen to fit your needs.

There is an option on the View menu to keep your Launcher in Workbook mode. It is a good idea to keep your Launcher in Workbook mode because with it you get a tab for every window that is open. This allows you to easily see which windows are open. You can also click on a respective tab to display the desired window to the front and to quickly move between open windows.

Understanding the Dynamic Nature of Menus

In the following step-by-step example, you will see demonstrated the dynamic nature of menu options.

Follow these steps to review the dynamic nature of menus:

1. Open the Checkout window.
2. Identify a borrower.
3. Click on the Borrower menu to see the options available to you. You notice that you have a limited set of options at this point.
4. Click on the **Clear** button at Checkout to clear the screen.
5. Click again on the Borrower menu.

   With no borrower identified in Checkout, you have fewer menu options available to you. In other words, by identifying the borrower to the system, you have many more menu options to choose from—for example, seeing borrower requests, and blocks and payments history information.

Searching for Records

Horizon searching uses indexes that have been created for the bibliographic information in your database. These indexes give you different ways to find information in your database.

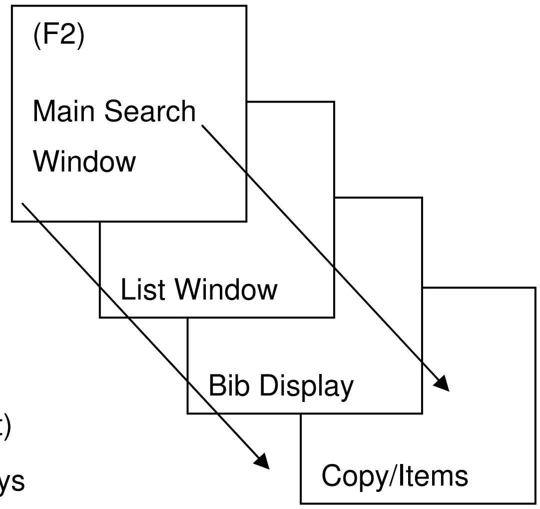
When you set up your production database, your system administrator determines which searches appear on your search menus, as well as their order. Keep in mind that the list of search indexes you see on a training database may be different from the ones on your live database.

There are three kinds of searches in Horizon: keyword searches, browse (or alphabetical) searches, and exact match searches. Keyword searches allow you to search the database for bibs that contain a particular word or words. Browse searches return an alphabetical list of bibs. You are positioned in the list at the word you searched for. Finally, exact match searches return one bib record that matches the search exactly, such as a particular barcode or ISBN number.

The diagram on the following page illustrates the screen progression that occurs when conducting a search. The workflow typically includes four primary screens, but even that may change depending on the type of search you conduct and the results set that is returned from your query.

You will learn about these topics in this section:

- Keyword searches
- Browse (or Alphabetical) searches
- Exact Match searches



Search Types

Browse (Open list)

Keyword (Closed list)

Exact Match (Displays directly to a bib record)

Keyword Searches

Keyword searches query the database and return all matches for a certain term. The term can appear anywhere in the MARC tags and subfields that have been mapped to that particular index. Keyword searches are often used when you have general information and are looking for anything that matches.

As an example, a title keyword search might have 245 tag information (title) mapped, 246 tag information (varying form of title), and 520 tag information (summary notes) mapped. The search results set that Horizon returns are those records in your database that matched your search term in the associated tags/subfields.

Follow these steps to conduct a title keyword search for the term “sports”.

1. Click the plus sign (+) next to Searching.
2. Double-click the Search PAC process (or press **F2**).
3. Select the Title Keyword search.
4. Enter “sports” in the **Search for:** field.

5. Click **OK**. This screen displays a list of matches, giving basic title, author, and pub date information.

Follow these steps to see the full bib record:

1. Select one of the items on the list.

2. Click **Show Detail**. This screen shows the full bib record.

To see the individual item records (or holdings) records, do the following.

1. Click **Show Copies**. If there were items at this location, they would be located on this screen. Since there are not, you can choose to view copies that are at other locations.

2. Click **All Locations**. This screen shows all of the item records that are attached to this bib. Now that you've seen a sample search, here are some other suggestions for keyword searches on the training database. Feel free to experiment with other searches as well

   The result screen shows an alphabetical list of subjects. The one you entered, or the one closest to it, will appear third on the list with an arrow pointing to it. The two listed above let you see others that appear near your term.

Browse (Alphabetical) Searches

Alphabetical searches query the database and place you in an alphabetical list at the first instance of the search term. Alphabetical searches are often used when you have specific information (like a specific title or subject). In this case, you want to be positioned in the list according to your entry.

Follow these steps to conduct a title alphabetical search for the term "sports":

1. Click the plus sign (+) next to Searching.

2. Double-click the Search PAC process (or press **F2**).

3. Select the Title Browse search.

4. Enter "sports" in the **Search for** field.

5. Click **OK**. This screen displays the list of titles in your database with the cursor positioned at the first instance of your search term. If the search

term does not exist, you will be at the point in the list (alphabetically) where the entry would normally be found.

Exact Match Searches

Exact match searching lets you search for a bib by its ISBN, an item barcode, or other unique identifier.

Follow these steps to conduct an exact match search:

1. Click the plus sign (+) next to Searching.
2. Double-click the Search PAC process (or press **F2**).
3. Select the ISBN search.
4. Enter an ISBN number in the **Search for** field.
5. Click **OK**. This screen displays the bibliographic record that matches your ISBN search request exactly.

The Send to Command (F10)

The **Send to** button is located on the button bar at the top of your Launcher. This button (or function command) opens a list window dynamically populated based on your current workflow.

You use the **Send to** button to transfer records from one place to another. For example, you can transfer a record that you have searched for to Cataloging, where you can edit it.

Follow these steps to send a record from PAC to the MARC editor:

1. Search for a record.
2. Display its bibliographic record.
3. Press **F10** to send the item to the MARC editor.
4. Edit the record in the MARC editor.

Payments and Blocks

In This Section Learn About:

•	Circulation receipts
•	Waiving a fine
•	Making a refund
•	Borrower payment history
•	Deleting a block

In this chapter we show you how to set up your circulation receipt options. You can choose to automate the printing of receipts for certain events. You can also decide at the time of the event whether or not you want to print a receipt.

You have several other options that relate to payments, refunds, and waivers. Deleting blocks is another option that we will discuss in this chapter.

The Checkout screen is the central point of contact for all of these Circulation activities. Blocks against a borrower are recorded in the borrower burb table. When you identify a borrower in Checkout, Horizon displays all block information currently displayed in the burb file.

Workflow associated with receiving payment was discussed in the Basic Circulation training session. If you need to review the steps for receiving payment in Horizon, refer to the Basic Circulation Training manual.

Setting up Receipt Printing

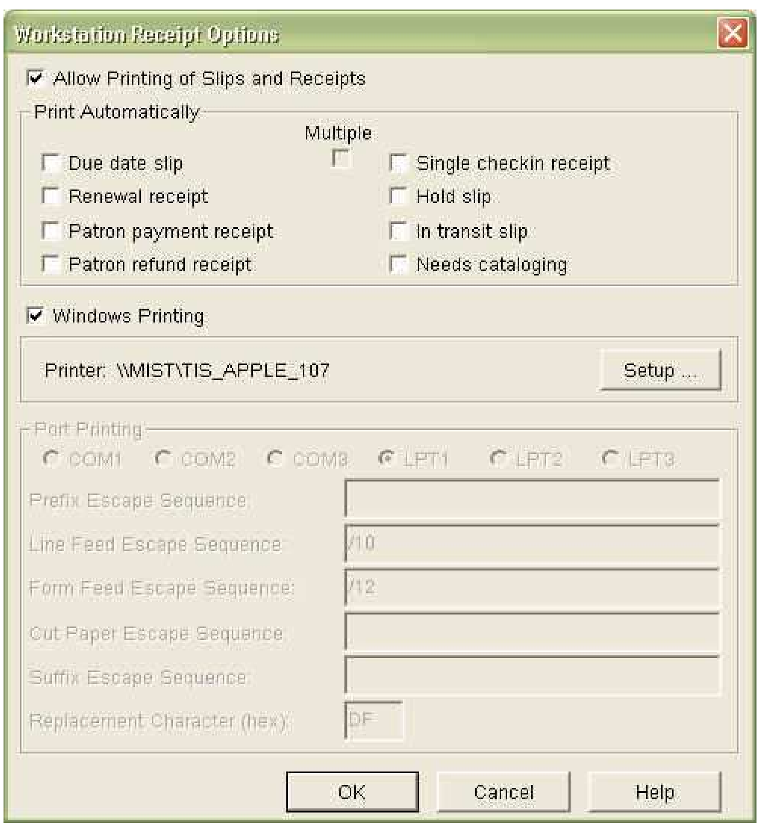
During your Implementation, Horizon provides you with a Peripheral Specialist to help you configure, profile, and test your peripheral equipment. Many libraries use receipt printers, which are a part of that configuration discussion. This training will help you recognize whether you have Windows or port printing settings.

In this section, we assume that you have already completed your peripheral equipment setup. You will have set up your printers either as Windows printers or you will bypass Windows printing and send your print commands directly from Horizon to a computer port connected to a local printer.

Questions about receipt printing setup should be directed to the appropriate member of your Implementation team.

Follow these steps to set up receipt printing:

1. Select Tools, Change Receipt Options. If you are using Windows printing, Horizon displays a window that looks like this. Notice the top half of the window is open to input. (If the bottom half of the window is open, skip to Step 3 below.):



When checked, the checkboxes on this screen automatically send a print command to the designated printer at the moment the event occurs.

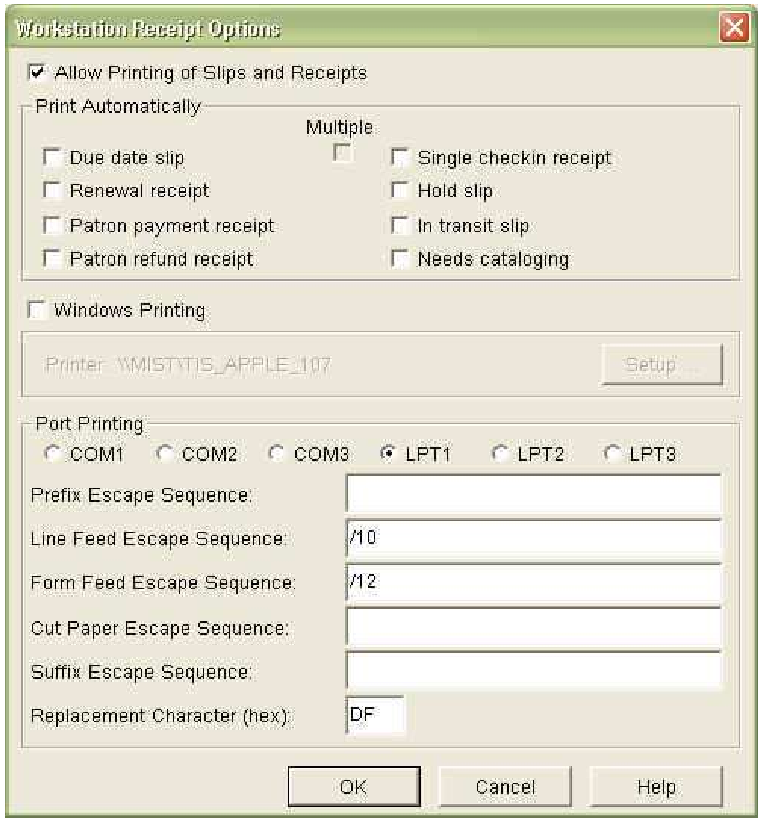
These are the print circulation receipt settings:

Due Date	Prints a receipt for items just checked out, giving the date items are due.
Renewal	Prints a receipt for items that have just been renewed.
Patron payment	Prints a receipt whenever a borrower makes a payment.
Patron refund receipt	Prints a receipt whenever a borrower receives a refund.
Single Checkin receipt	Prints a receipt whenever a borrower checks out a single item.
Hold slip	Prints a holds slip, which can be placed inside the cover of an item that has just been placed on hold.
In transit slip	Prints a transit slip, which can be placed inside the cover of an item that has just been placed in transit to another location.
Needs cataloging	Prints a slip that can be placed within a book's cover, indicating it needs to be sent to Cataloging.

2. Review the settings in your receipt printing window with the settings above. Those settings with a check in the checkbox have been set to automatically print.

Items set to print automatically can always be overridden at that given point in your workflow.

3. At step 1, you may have noticed that the Windows printing checkbox was not checked, leaving the top portion of your Workstation Printing options window grayed out and the bottom portion of your Workstation Printing Options populated with data, like this:



This type of setting indicates that you are bypassing Windows printing and are sending the print command directly to a printer attached through a local port on your computer.

Whatever your preferences, Horizon uses the settings that have been profiled in this area and displays them for your review.

Once your printing profiling is set up, you generally will not need to make changes to it. If you find that you prefer to change receipt printing preferences, you can come here to get it done.

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4. If you have made changes to the printing setup, click **OK** to save those changes and exit the record.

Printing a Receipt

In this section you will learn how to print a due date receipt for a borrower that has just checked items out of your library.

Follow these steps to print a due date receipt:

1. Open the Checkout window.
2. Identify a borrower in Checkout.

   You can either scan in the borrower's library card or press **F4** and search for the borrower by last name.

3. Check out items to the borrower.
4. At the conclusion of the checkout session, press **F11** to send a print command to the printer. (This prints out a list of the items that were checked out in the current session.

   If you desire to print a list of all items out to the borrower, click on the **All Items Out** button to display the complete list. You can select everything in the list (**Ctrl + A**) and then enter the print command.

Waiving a Fine

You can waive a fine by checking in an item in Exempt Fines mode. Using that option, however, does not leave a record of the waiver in the borrower's history file. If you want to retain a record of fine waivers, you should check in the item in Standard Checkin mode, and then select Blocks, Waiver to waive the fine and retain a history of the event.

Follow these steps to waive a fine:

1. Open the Checkin window.
2. Check in the overdue (or otherwise delinquent) record in Standard Checkin mode.
3. Click on the **Show Blocks** button to view the current blocks for the borrower that had this item checked out.

> If you are waiving the fine at the Checkout window, you will identify the borrower and the Blocks window will automatically display. You can then proceed with this workflow.

4. Select the block or blocks that you would like to waive. Horizon will list the default amount being waived based on your selection. You can change that amount and make a partial waiver if you want to. At the Waiver window, Horizon does not let you waive for an amount greater than that which is owed (creating a credit due situation).
5. Enter a comment into the Comments field so you have a statement about the waiver that will help you if clarification of the event is needed at some future date.
6. Click **OK** to waive the fine. This also places an event in the borrower's history file.

Issuing a Refund

You can issue a refund only on an amount listed as a credit within Horizon. Credit due appears as a negative amount in the Blocks window and is clearly identified as credit due. Should you ever need to refund money to a borrower and no credit is listed in their Blocks window, you will have to use the Blocks, Add Fee option to add in a negative amount, which can then be refunded to the borrower.

Follow these steps to issue a refund:

1. Open the Checkout window.
2. Identify the borrower.

   If a refund event occurred since the borrower has last been identified to the system, Horizon immediately displays a dialog box indicating that a refund is owed to the borrower.

   If off-setting fines and refunds are due, Horizon makes you aware of the discrepancy and either does the math and adjusts the borrower's record accordingly; or, you can cancel out when the message displays and handle the necessary adjustments manually.

3. Click **Show Blocks** to access the borrower's block record.
4. Highlight the line item that needs to be refunded (it will appear as a negative amount) and select Blocks, Refund.

   A Refund window opens up, displaying the amount to be refunded.

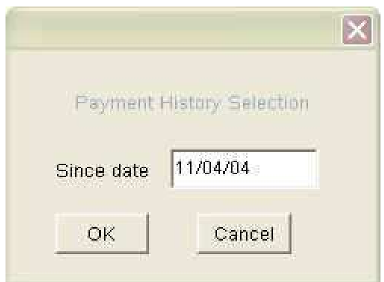
5. Verify the amount you want to refund. It is always a good idea to add a comment into the Comment field to ensure you have a good record for the reason you granted the refund.
6. Click **OK** to complete the refund to the borrower..

Viewing Borrower Payment History

There are times when you may need to go into a borrower's payment history to see how he or she has been handling their association with the library. Likewise, there are times when a patron might want to know what has transpired for a given time period that affects his or her borrower record.

Follow these steps to view a borrower's payment history:

1. Open the Checkout window.
2. Identify the borrower.
3. Select Borrower, Payment History. A window like this appears:



4. Enter a date into the Since date field and press **OK**. A Payment History List screen appears, giving a history of all payments since the date specified.

   On this screen you can use these buttons:

   a. **Close**. Close the payment history window.
   b. **Display**. Change the display order and columns displaying in the window.
   c. **Since**. Change the since date setting to redirect the history information that is displaying.
   d. **Select Fee Code**. Opt to look at history entries for just a given fee code instead of all fee codes.

5. Press **Close**. Horizon closes the Payment History window.

You can also access a history of borrower blocks from the Borrower menu at Checkout.

Deleting a Block

You can delete note-based blocks from the system at the Current Block Detail window. You cannot manually delete fee-based or system-supplied blocks; instead, you resolve them using normal circulation procedures (for instance, receiving payment or waiving a fine):

Follow these steps to delete a block:

1. Open the Checkout window.

2. Identify the borrower. Horizon displays the Blocks window:

3. Click **Detail** to see the block in detail. Horizon displays the Current Block Detail window.

> You can also delete a block directly from the Current Blocks window. With the block you want to delete selected, go to the Blocks menu and select Delete.

4. Select the block you want to delete and click **Delete**. Horizon displays a dialog box so you can confirm that you really do want to delete the block.

5. Click **OK** on the dialog box to confirm the deletion.

> Remember, certain kinds of blocks, such as fee-based blocks, cannot be deleted from this window. You must resolve the block by receiving or waiving payment.

6. Click **Close**.

Requests and Holds

In This Section Learn About:

•	Placing requests
	Adjusting the order of the holds queue
•	Managing the pull list
•	Request review list

When an item is unavailable for checkout a borrower can enter a queue to wait for the item to become available. When the requested item is checked back in, Horizon notifies library staff that the item has been reserved for the appropriate borrower. The item is then placed on a holds shelf and the borrower notified that the request is available to him or her.

The terms “Requests” and “Holds” are often used interchangeably. You should be aware, however, that there is a specific moment at which a request becomes a hold. That moment is when the request is actually “trapped” by Horizon, meaning, the point at which Horizon associates a borrower with the requested item and that item is available for pickup.

When a requested item is checked in, Horizon notifies you that it has been requested by a specific borrower. Horizon displays the borrower name and prompts you to hold the item for him or her.

The status of the item changes to *item being held* at the moment you click **OK**, affirming that you are reserving the item for that particular person. You can then place the item on the Holds shelf; or, if the item needs to be sent to another location, you can place the item in transit to the location Horizon specifies.

Placing a Request

You can make a request for borrowers using staffPAC searching. When you have successfully searched for the item you want to request, you can place the request at any of these locations by executing the **F5** command, or from the Requests menu, Make Request.

e. **Search List Window**. Requests made at the Search List level are first available copy requests. Be careful about making requests from the list level because you have limited information available to you about the item you are requesting.

f. **Bibliographic Detail Window**. Requests made here are first available copy requests as well. You are looking at the bib record when you make the request so you have more information available to you at this level.

g. **Copies Window**. Requests made at the item (copies) level can be first available copy requests or item specific requests, if you so desire. At the item level you can see the owning library, number of copies available and their current statuses, and other vital information.

Your library may have set up your Horizon Information Portal (HIP), used by your borrowers, to allow for borrower unassisted requests as well. If you have set up your system accordingly, you should also become familiar with Requests workflow in HIP.

Follow these steps to place a request:

1. Open the Checkout window.
2. Identify a borrower at Checkout. (With the borrower identified, Horizon knows who you want to make the new request for.)
3. Press **F2** to conduct a search.
4. Select an index and enter a search term. You can place a request at a list, bib, or item level.
5. From a list, bib, or item level, press **F5** to make a request for the patron you identified in Step 2. Horizon displays a Request window similar to this one:

Request Button

6. The cursor is positioned at the This Copy Only checkbox. Placing a check in the box will place an item specific hold.

7. Horizon defaults the pickup location based on your profiling decisions. If you want to change the pickup location, click **Codes** and select another location.

8. Click on the **Request** button to make the request. Horizon displays a dialog box indicating your request was successfully placed and the library will be alerted.

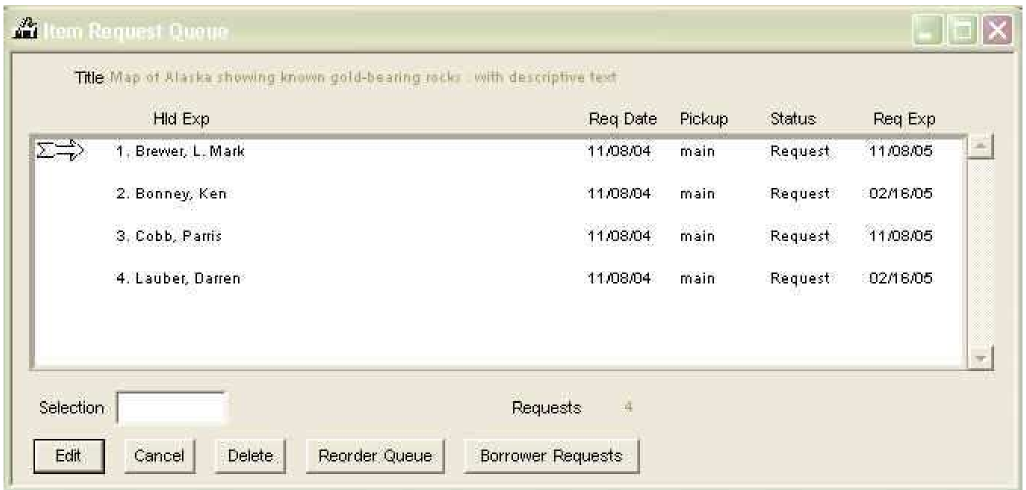
9. Click **OK**. Horizon redisplays the search window.

Adjusting the Order of the Holds Queue

With the right security permissions, you can adjust the order of the holds queue. For example, you could move a borrower in the number 4 position in the queue to the number 1 position the queue. Making such a change means that you are overriding the time- and date-based order of the queue to lend next to someone that has been manually placed at the top of the queue.

Follow these steps to adjust the order of the holds queue:

1. Press **F2** to conduct a search.
2. Select the item for which you want to review the holds queue.
3. Select Request, View Title Request List. Horizon displays the Item Request Queue window:



4. To reorder the queue, select the name that you want to move to the top of the queue and click **Reorder Queue**. Horizon displays the current position of the person in the queue and prompts you to enter the new queue position.
5. Enter the new queue position for the selected borrower. For example, enter "1" to move the borrower to the top of the holds queue. The selected person moves to his or her new queue position and everyone in a lower queue position moves down one position.

You can click the **Edit** button to change pickup location, change the request date, or suspend (delay the hold from taking effect for this borrower) until a given date.

Managing the Pull List

Horizon expects each location to print a Pull List to remove eligible items from the shelf. Generating the Pull List automatically assigns the location printing the report as the "fill" location with a "fill" date.

The Pull List Report also prints a specific barcode for the request even when the request is not barcode-specific. Don't let this confuse you. Any eligible item from the bib record of the request will actually fill the request when a library staff member checks in the item. Only those items with a checkmark in the Specific column are specific-item requests.

The Request Pull List has a **Sort** and **Display** button to help you view the list according to your preferences. There are four primary buttons at the bottom of its window:

List Pulled. Gives the library until midnight that day to find items on shelf and complete the request by taking the items through Circulation Checkin. If the list is reviewed later in the same day, these titles will not be on it.

Keep List. Keeps all (unfilled) requested titles in the communal list. In a multi-location library, Horizon sends the titles on to another location that owns the item. Keep List sends titles back into the queue immediately.

Keep Item. Keeps selected (unfilled) requested titles in the communal list. Horizon sends the selected titles on to another location that owns the item. Keep Item sends titles back into the queue immediately.

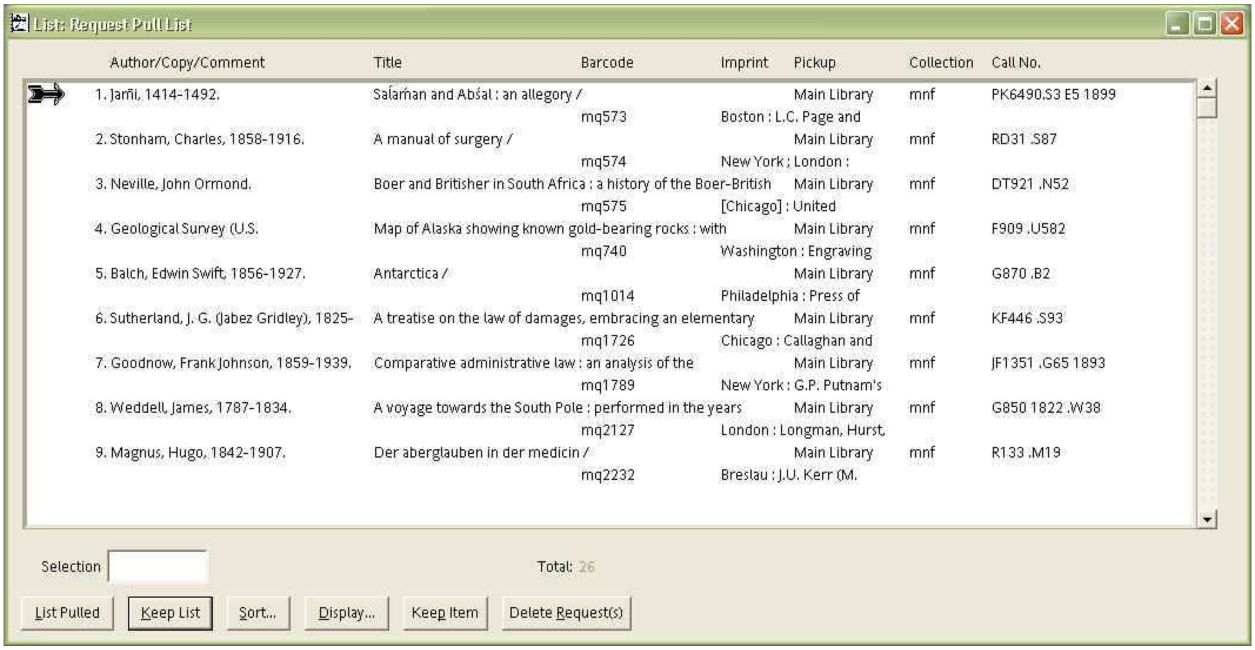
Delete Request(s). Deletes the selected requests from the pull list. A note is placed into the borrowers PURF (blocks) file. Depending on your profiling decisions, Horizon may also send a notice to the borrower, informing him or her of the deleted request.

Managing the Pull List for a Single-Location Library

Now and again you may encounter an item barcode that does not read correctly in Checkout. If your library policy permits you to do so, you can search for the item in PAC and send it to Checkout.

Follow these steps to manage the pull list for a single-item library:

1. Open the Request Pull List (Navigation bar, Circulation folder, Circulation Reports):



2. Sort and display the list according to your preferences.
3. Select File, Print. Horizon may display a print dialog box. If so, select the desired printer. The report prints.
4. Click **List Pulled**.
5. Close the pull list and the Circulation Reports window.
6. Go to the shelves and retrieve the items on the pull list.
7. Note any items not found.
8. Check in the items that you pulled from the shelves. This trips the holds and prompts you to place the items on the holds shelf.

9. Items not found continue to appear on the pull list until the request is deleted, or until you manually change the item status to Trace.

Managing the Pull List for a Multiple-Location Library

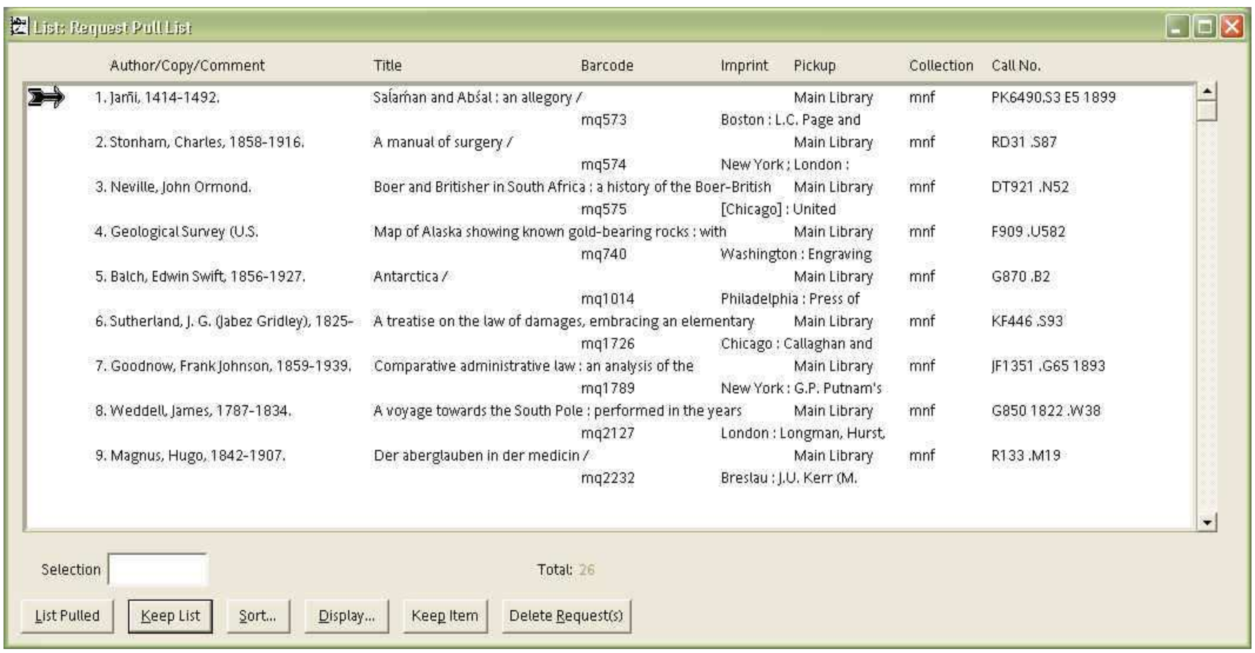
Horizon is proficient in filling requests. Horizon has a mechanism to monitor all checkins to see if there is a match between a requested item and “available” copies on the shelf. Horizon is profiled with the lending rules that you want enforced at your library.

At Checkin, Horizon “traps” requested items so they can be lent to the appropriate borrower. You run the pull list to retrieve the available copies and either put them on the holds shelf or send them to the pickup site.

> This workflow assumes that items not found on the shelf should be passed immediately to other libraries that can fill the requests.

Follow these steps to manage the pull list for a multiple-location library:

1. Open the Request Pull List (Navigation bar, Circulation folder, Circulation Reports):



2. Sort and display the list according to your preferences.
3. Select File, Print. Horizon displays the pull list:
4. Leave the report on the screen.
5. Go to the shelves and retrieve the items on the pull list.
6. Make a note of any items not found on the shelves.

7. Check in the items found. (This can be done on a different PC that the one which has the request pull list up.)

8. Return to the request pull list.

9. Click **Keep List** to immediately pass on any items not found.

10. Click **Close** to close the pull list.

For items not found on the shelf, search your catalog to see if any copies are available.

- **If no copies are available.** Library staff will need to manually delete the request and notify the borrower. You can delete the request from the pull list window. Remember to change the status of the item to "Trace" or other local status to indicate it is missing from the shelf.
- **If other copies are available.** Change the status of the item to "Trace" or other local status to indicate it is missing from the shelf.

Transit Holds and Requests

This workflow tracks filling a request for an item that Horizon instructs you to send to another library. This section addresses not just how to send an item to another location, but also how to receive an item from another location and check it out to a borrower at your library.

This process assumes that you have generated the pull list and collected the items from the list from the shelves. For this workflow, we also assume that the holds trapped are for borrowers at a location other than your own.

You are now ready to check in the items on the pull list to trap the respective holds.

Follow these steps to process a transit request:

1. At Checkin, wand in a pull list item that you gathered from the shelf. Horizon displays a prompt, directing you to send the item to the location designated at the time the request was placed:

2. Click **Continue** filling the request.

3. Follow your established policy and place the item in its designated place so it can be shipped to the location Horizon indicated.

   As long as you have not cleared the Checkin window, Horizon displays the destination for the item in question. If you have cleared or closed Checkin, you will have to check the item in again to see where the item should be sent. (Horizon tells you the location that the item is being sent to.)

When the item arrives at the designated location, do the following:

1. Check the item into the receiving location (regular Checkin screen). Horizon indicates the item has been requested by … and gives the name of the borrower.

2. Click **OK** to trap the request for this borrower. The status of the item is changed to Item Being Held.

3. Place the item on the hold shelf, reserved for the borrower indicated. Horizon prints a holds receipt, which you can put inside the book cover, if that is your workflow.

4. Continue checking in any other items that you have received from another library in your system.

Notices

In This Section Learn About:

•	Creating and outputting batch notices
•	Notice generation and delivery
•	Reminders and Invoices
•	Notice timeline

A notice is a form that notifies a borrower of a fine, fee, or message.

Horizon automatically generates notices when either Day End or the notice generator in Circulation Reports is run and notice parameters are met. These parameters are set by your system administrator and can include an amount that is owed and the number of items overdue.

You can elect to have notices phoned in (manually or by Telecirc), emailed, or sent through the postal service. This requires setup on the part of your library before it is ready to use.

The specific types of notices will differ between libraries (depending on which blocks your library prints out). These are the most common types of notices:

- Hold and request notices
- Recall notices
- Overdue notices
- Billing notices
- Reminder notices
- Invoices
- Reminder invoices

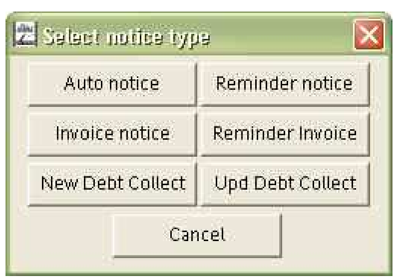
Creating and Outputting Batch Notices

Follow these steps to create a batch of notices and send them to the printer:

1. Open Circulation Reports to run a new batch of notices (Navigation Bar, Circulation, Circulation Reports). .

2. Select Notices, Notice Output. A window like this one appears, showing the types of notices that have been recently run and for which locations:

3. Click **New Batch** to generate a new batch of notices. Horizon displays a window like this one, prompting you to select the type of notices that you want to run:



4. In this example we run **Auto notice** (top left). The system displays another window, prompting you to select the location or locations for which you want to run this report.

   In this example we select the City Public – Main location and run auto notices for it. Once you run the notices, you have “queued them up.” In other words, Horizon generated the statistical data for the report, and now you need to actually send the report (output it) to the printer.

This is what the queued report looks like, still not outputted. You can see it has not been printed yet by the absence of a date in the Last Output column and a value of "0" in the Times column:

- Use the **Select** button to access a specific portion of a report and reprint it. (For example, use **Select** if you had a power surge or a printer jam during printing and you need to reprint from a given point.)
- Use the **Purge** button to purge (delete) a report from the batch list.
- Use the **Cancel** button to close the Batch List window.
- Use the **Display** button to display desired columns and to order the display.
- Use the **Edit** button to add a note to a given report.

5. Click **Output** to print the report. Horizon may display the Notice Printer dialog box.

6. Select the desired printer. If you have but a single printer option, the print command will automatically be sent to that printer.

7. When the report is successfully printed, you can print a new batch, or you can select File, Exit to close Circulation Reports.

Selective Outputting of Notices

There may be times when your notice printing is interrupted by a power failure, component part malfunction, or a paper jam in the printer. When your notice printing is interrupted, you can select the specific notices that missed printing and which need to be forced to print.

Follow these steps to selectively print notices:

1. Open Circulation Reports to run a new batch of notices (Navigation Bar, Circulation, Circulation Reports). .

2. Select Notices, Notice Output. A window like this one appears, showing the types of notices that have been recently run and for which locations:

3. Highlight the batch that you want to selectively output.

4. Click **Select** to display the batch print job. Horizon displays a window like this one:

5. Select the items from the batch that you need to reprint. For example, suppose your printer jams after printing the 4th notice.

6. Select the remaining notices, starting with number 5, to the end of the list.

7. Click **Output** to print the highlighted items. Horizon may display a print dialog box.

8. If you see a print dialog box, select the printer you want to print to and press **OK**. Horizon prints out the remaining notices.

Sending Reminders and Invoices

Reminder notices combine both overdue notices and billing notices. Horizon sends them out in addition to the normal overdue notices and billing notices. You generate reminders manually rather than by Day End. When you select the Print Reminders command in Circulation Reports, Circulation checks to see if there are any borrowers who have exceeded a certain number of overdue items or who have more than a certain fine amount. Horizon then generates reminders for borrowers who have exceeded one of these limits.

Horizon can produce numbered invoices according to a library-specified billing cycle. Invoices list previously uninvoiced fees but do not include unpaid balances or details of unpaid previous invoices.

Reminder invoices combine information from all invoices for a borrower and are sent out in addition to the regular invoices. With the reminder invoice, all accumulated charges on one borrower's account are gathered on one invoice. Your system administrator determines the number of days Horizon delays in sending out a reminder invoice after a regular invoice remains unpaid.

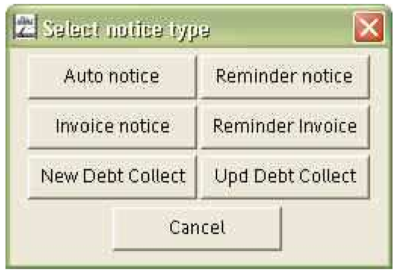
Horizon sorts reminder invoices in Circulation Reports by borrower number and invoice number.

Follow these steps to send reminders and invoices:

1. Open Circulation Reports to run a new batch of notices (Navigation Bar, Circulation, Circulation Reports). .

2. Select Notices, Notice Output. A window like this one appears, showing the types of notices that have been recently run and for which locations:

3. Click **New Batch** to generate a new batch of notices. Horizon displays a window like this one, prompting you to select the type of notices that you want to run:



4. Select **Invoice notice**, **Reminder notice**, or **Reminder invoice**. The system displays another window, prompting you to select the location or locations for which you want to run this report.

5. Select the location or locations for which you want to run this report. Horizon displays a report window similar to this one:

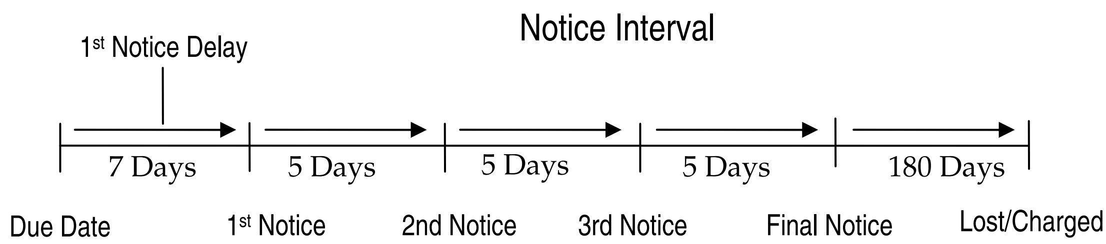
6. Click **Output** to print the report. Horizon may display the Notice Printer dialog box.

7. Select the desired printer. If you have but a single printer option, the print command will automatically be sent to that printer.

8. When the report is successfully printed, you can print a new batch, or you can select File, Exit to close Circulation Reports.

The Notice Timeline

The notice timeline provided will give you a quick visual reference of how Horizon generates notices and how the notice interval works. The days associated with each interval are set by the library. Your settings will vary. The settings in this example are for illustration purposes only.



Exercises

These training exercises will help you practice the skills you learned in Horizon Intermediate Circulation Training. Follow the instructions in this section to review the things you've learned and to practice your skills.

1. Identify Roslyn Bean as the borrower at Checkout.
2. Select one overdue fee in Roslyn's blocks window and waive that fee.
3. Add a negative fee for the amount of $10.00 (Begin at Blocks, Add Fee.)
4. Refresh the screen and select the negative fee you just put into Horizon. Then, refund the $10.00 you just entered to the borrower.
5. Check the payment history for this borrower.
6. Check the blocks history for this borrower.
7. .Delete one additional block from.
8. Place a request from a list, bib, and items level.
9. Open the Pull List and review its contents.
10. Review the workflow in retrieving items on the pull list, checking them in, and putting items on the holds shelf or sending them on to other locations, as applicable.
11. Create a new batch of notices.
12. Review the workflow in selectively printing specific notices.
13. Print reminder notices and invoices.
14. Review the notices timeline.